Instructions for New Templates Instances

In an effort to streamline the process to enter modules, on road trainings and payments for students, there is now the option to add multiple instances at a time.

Some fields have specific formatting rules. For example, the License number should start with an S.

This process can be done either manually, by entering each student in with the required information, or you can import a listing of the students using the template format provided to you.

Business rule information for fields is at the end of this document.

Adding Multiple Modules

Importing Modules

- Complete the **IMPORT MODULES** spreadsheet for upload
- Save the spreadsheet on your computer, make sure **worksheet** (not the file) is named **modules**.
- Click **Add multiple modules** hyperlink
- Click the **Import Modules** button
- Click Browse…
- Find the location of the spreadsheet you saved
- Click the **Import** button

The data from the spreadsheet will fill in the appropriate fields on the Portal.

Click Next button

In the Summary section:

- o Before submitting this activity, you have the opportunity to review the information entered. If you noticed that something added is wrong, you can make edits as needed.

Click Submit button

Adding Multiple On Road Trainings

Importing On Road Trainings

- Complete the **IMPORT TRAININGS** spreadsheet for upload (time is in military time)
- Save the spreadsheet on your computer, make sure **worksheet** (not the file) is named **trainings**
- Click **Add multiple trainings** hyperlink
- Click the **Import trainings** button
- Click Browse…
- Find the location of the spreadsheet you saved
- Click the **Import** button

The data from the spreadsheet will fill in the appropriate fields on the Portal.

Click Next button

In the Summary section:

- o Before submitting this activity, you have the opportunity to review the information entered. If you noticed that something added is wrong, you can jump back to a previous section and make edits as needed.

Click Submit button

Adding Multiple Payments

Importing Payments

- ☐ Complete the **IMPORT PAYMENTS** spreadsheet for upload
- ☐ Save the spreadsheet on your computer, make sure **worksheet** (not the file) is named **payments**.
- ☐ Click **Add multiple payments** hyperlink
- ☐ Click the **Import Payments** button
- ☐ Click Browse…
- ☐ Find the location of the spreadsheet you saved
- ☐ Click the **Import** button

The data from the spreadsheet will fill in the appropriate fields on the Portal.

Click Next button

In the Summary section:

- o Before submitting this activity, you have the opportunity to review the information entered. If you noticed that something added is wrong, you can make edits as needed.

Click Submit button

BUSINESS AND FIELD RULES

IMPORTING MODULES

Module Date: Date the module was taken
Business Rules:
- Required field
- Students cannot exceed more than 6hrs of training (includes driving) in a single day.

Examples:
- 3 classroom modules in one day.
- 2 classroom and 1 road training in a day.

Module Number: Module number representing a training
Business Rules:
- Required field
- Module 17 (Final Exam) cannot be added if modules 1-15 have not been taken.
- Students can only take a module once unless it's the final exam, which will be passed with a score of 80 or higher
- Module 16 is required if the student is under 18
- Module 16 and the Final Exam module (17) do not adhere to the 3 modules/2 modules 1 training rule
- A module can be added to a student who does not have a license number

Instructor license number
Business Rules:
- Required field
- Must match with a valid/active Massachusetts instructor license number.
- Instructor's license credential must be active on the date of the module

Student Permit/License Number
Business Rules:
- Required field when the student has been issued Permit
- Must match with a valid/active Massachusetts Permit/License number.
- Last name and DOB must match the Permit/License account information with the RMV.

Student Last Name

Business Rules:

- Required field
- Once a Permit/License number has been entered last name must match the account information for the RMV.

Student Date of Birth

Business Rules:

- Required field, must be 8 digits
- Student must be at least 15yr 9 months old
- Once a Permit/License number has been entered DOB must match the account information for the RMV.

Example:

- 02/02/2000

Parent Name

Business Rules:

- Required for module 16 (Parent class)

Parent State

Business Rules:

- Optional
- Must match the parents credential issued state

Parent license number

Business Rules:

- Optional
- Must match the parents credential number

Final Exam score

Business Rules:

- Must be 0-100.
- Each instance of the exam must be entered
- Marked as passed once score is above 80
- Required for module 17 (Final Exam)

Additional Notes

For importing modules, the sheet name of the excel document must be named '**Modules**'

fintModule	fstrDecode1	fstrDecode2	fstrDescription
1		Intro to Driver's Ed	Introduction to Driver's Education
2		Signs, Signals, Road Markings	Signs, Signals, and Road Markings
3		Understanding Vehicle Controls	Understanding the Vehicle and Its
4		Basic Driving Skills	Basic Driving Skills
5		Rules of the Road	Rules of the Road
6		Safe Driving Decisions	Making Safe Driving Decisions
7		Sharing the Road	Sharing the Road
8		Natural Law Effects Driving	How Natural Law Effects Driving
9		Different Driving Environments	Different Driving Environments
10		Driving in Weather Conditions	Driving in All Weather Conditions
11		Mental and Physical Effects	Mental and Physical Effects on Driving
12		Dangers of Alcohol, Drugs and Driving	The Dangers of Alcohol, Drugs and
13		Distracted Driving	Distracted Driving
14		Unsafe Driving Consequences	Consequences of Unsafe Driving and
15		Handling Emergency and Breakdowns	Handling Emergencies and
16		Parent/Guardian Curriculum	Parent/Guardian Curriculum -
17		Final Exam	Final Exam

IMPORTING ON ROAD TRAININGS

Training Date: Date the training was taken

Business Rules:
- Required field
- 1 on road training allowed per day.
- Students cannot exceed more than 6hrs of training (includes classroom) in a single day. The application will not allow you to add more than 3 modules or 2 modules and 1 road training for a specified date.

Examples:
- 3 classroom modules in one day.
- 2 classroom and 1 road training in a day.

Start Time

Business Rules:
- Required field
- Military time

Example:
- **15:00 is 3:00 pm**

End Time

 Business Rules:
- Required field
- Military time

Example:
- **16:00 is 4:00 pm**

Instructor License Number

Business Rules:
- Required field.
- Instructor's credential must be active on date of the training

Vehicle plate number

Business Rules:
- Required field

Student License Number

Business Rules:
- Required field

Minutes Observing

Business Rules:
- Required field
- Minutes Observing and minutes driving cannot exceed 120 minutes for a single trip

Minutes Driving
Business Rules:
- Required field
- Minutes Observing and minutes driving cannot exceed 120 minutes for a single trip

Additional Notes
For importing modules, the sheet name of the excel document must be named '**Trainings**'

IMPORTING PAYMENTS

Payment Date
Business Rules:
- Required field

Payment Type
Business Rules:
- Required field
- Value must be Cash, Check, or Credit Card

Payment Amount
Business Rules:
- Required field
- Do not format as currency

Example:
- 600.00 NOT $600.00

Student License Number
Business Rules:
- Optional field
- Required if student has Permit/License

Student Last Name

Business Rules:
- Required field

Student Date of Birth

Business Rules:
- Required field
- 8 digit date

Example:
- 02/02/2001

Additional Notes

For importing payments, the sheet name must be named '**Payments**'